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The Agricultural Biotechnology Market in Belgium

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— the FaxLink Domestic service (613-944-4500); and
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THE AGRICULTURAL BIOTECHNOLOGY MARKET IN BELGUM

Team Canada Inc • Équipe Canada inc

EXECUTIVE SUMMARY

The agricultural biotechnology industry in Belgium is growing rapidly, and the government is actively supporting this growth with research and development funding, and the creation of centres of excellence. The three regions of the country, Flanders, Wallonia and the Brussels-Capital region compete to attract foreign investment and improve their trading positions. Incentives exist to promote research and business development. Federal and local governments are strong supporters of biotechnology as a source of knowledge-based employment and economic growth.

With combined revenue exceeding $2.4 billion in 1997 and a growth rate of approximately 24%, Belgium is a major biotechnology competitor in the European Union, along with the Netherlands, Germany and the United Kingdom. The country has an export-driven economy that is outward-focussed — open to external suppliers, foreign investment, joint ventures and strategic alliances.

Opportunities in the Belgian agricultural biotechnology market include research partnerships and collaboration with the strong network of academic and research institutions. There is also a strong movement to educate consumers about the benefits of genetically modified (GM) food and crops, which presents opportunities for firms with experience in public relations and public education related to biotechnology. Furthermore, a recent survey found that most Belgian companies were interested in promoting technology transfer within the industry, creating and strengthening alliances, and accelerating the commercialization of research results. Canadian agricultural biotechnology firms will find opportunities to take advantage of favourable government regulations and industry interest in partnerships. However, public uncertainty of the benefits of agricultural biotechnology and a moratorium by the European Union on approvals of additional genetically altered food products present challenges to Canadian companies interested in accessing the Belgian and European markets.

Despite regulatory uncertainty and public concerns, there is still potential for Canadian companies in other areas of the Belgian agricultural biotechnology market.

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THE AGRICULTURAL BIOTECHNOLOGY MARKET IN BELGIUM

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MARKET OVERVIEW[1]

While Belgium's biotechnology industry is young, it is growing in importance and expertise, and is poised to capitalize on the results of years of R&D that local universities have undertaken. The Belgian Biotechnology Association reports that there are approximately 52 companies involved in biotechnology, with 23 focussed on health care and pharmaceuticals, 5 on agricultural biotechnology, 4 on environmental biotechnology, and 20 involved in related activities. Together, the biotechnology industry in Belgium directly employs more than 4400 people. Combined revenue exceeded $2.4 billion in 1997, and the total industry is growing at approximately 24% annually. More than $350 million is invested in research and development each year, contributing to the growth of the industry.

Table 1. Biotechnology in Belgium by Sector.

Sector	Number of Companies	Revenue ($)	Employees
Health Care	23	1 798 000	3 434
Ag-Bio	5	112 000	435
Environment	4	9 900	40
Other	20	484 000	562
Total	**52**	**2 403 900**	**4 471**

Source: *Belgian Biotechnology Association. Biotech in Belgium: Innovation and Growth*, October 1998.

Belgium is a major biotechnology competitor in the European Union (EU), along with the Netherlands, Germany and the United Kingdom. The country has an export-driven economy that is open to external suppliers, foreign investment, joint ventures and strategic alliances. Belgium has well-respected universities, which are recognized leaders in the field of biotechnology. There is also strong government support for biotechnology research and development, although there is some debate over freedom of choice and consumer acceptance of genetically modified organisms (GMOs).

[1] All dollar amounts are in Canadian funds unless otherwise stated. The source for the currency conversion rates for the Canadian dollar and the Belgian franc are the average annual rates based on IDD Information Services, *Tradeline*, July, 1999.

While the Belgian public is accepting of biopharmaceuticals, some scepticism remains about the value of genetically engineered food products. There does not appear, however, to be a strong protest movement within the country. Scientists suggest that the distance between the public and EU regulatory bodies, as well as the recent mad-cow disease scare in the United Kingdom and the Belgian dioxin scandal, have made consumers wary of new food technology and government information.

Field trials of genetically modified crops have being carried out in Belgium since 1986. In 1999, transgenic crops occupied a total surface of 97 hectares. Hybrid oilseed rape is being tested extensively, followed by corn, chicory, sugarbeet, potato, cabbage and cereals. No genetically modified crops have being commercially grown in Belgium to date, however, several transgenic lines are authorised for commercial cultivation and/or use according to the European directive 90/220/EEC : herbicide tolerant soybean (Monsanto), insect tolerant Bt-corn (Novartis, Monsanto) and herbicide tolerant corn (Agrevo). There is currently no agronomic interest in Belgium for the cultivation of soybean or insect tolerant corn. Oilseed rape (canola) lines developed by the Belgian company Plant Genetic Systems (now part of Aventis Crop Science) are still seeking European authorisation but consumption of the oil is allowed.

The three regions of the country, Flanders, Wallonia and the Brussels-Capital region compete to attract foreign investment and improve their trading positions. Incentives exist to promote research and business development. Federal and local governments are strong supporters of biotechnology as a source of knowledge-based employment and economic growth. Traditionally, Belgium's biotechnology strength has been in Wallonia, with as much as 70% of national biotechnology revenues in this area. Growth here is often attributed to the presence of large multinational pharmaceutical firms. As well, strong university research throughout the 1980s gave rise to start-up firms. More recently, Wallonia has become an important agricultural centre, where new technologies and the development of superior crops are the result of high-technology research in such institutes as the Biotechnology Research Centre at the Université Libre de Bruxelles.

In recent years, incentive programs, capital investment initiatives, and the Flanders Interuniversity Institute of Biotechnology (VIB), which has more than 200 senior researchers in 9 university departments, have prompted dramatic growth of biotechnology firms in the Flanders region. The Flemish government has set up a system of industrial zones in which high-technology firms have established themselves, and with grant programs from the Institute for the Promotion of Innovation by Science and Technology (IWT) and Biotech Fund Flanders, many companies are developing commercially viable biotechnology products in this region. Flanders has a strong background in biotechnology with research as early as the 1970s leading scientists to a more complete understanding of genetic determinants and plant biotechnology. This solid research tradition continues to fuel growth in the industry. For example, Plant Genetic Systems' SeedLink hybrid oilseed rapeseed has been successfully introduced

to the Canadian market. They were an early leader in the area of agricultural biotechnology and continue to be a cornerstone in the industry. Two recent companies in the Flanders region are CropDesign and Netherlands-based Pharming.

Key Factors Shaping Market Growth

European Union

In April 1998, the EU postponed approving genetically modified products in response to public concerns. In June 1999, environment ministers representing all 15 EU countries agreed not to approve any GM products until a new approval and monitoring system is put into place. The new set of regulations will likely include a mandatory review of all GMOs after 10 years, tighter safety regulations, and an increased role for an ethical committee in the decision-making process. The moratorium could remain in place as late as 2002. Analysts expect the decision-making process to be a difficult one, given the variety of opinion within the EU on the various issues surrounding GM food. Canadian firms interested in directly exporting GM food products to Belgium should keep abreast of developments in this area.

Public Concerns

In general, the Belgian public is poorly informed of the issues surrounding biotechnology. Analysts suggest that more transparency with research results, public relations campaigns focussed on the benefits of biotechnology, and a more open government approval process would improve public perceptions. The Belgian Food Industry Federation (FEVIA) has also stressed the need for public education in the area of biotechnology. According to Dr. Mark Van Montagu, a leading biotechnology scientist in Belgium, Europeans see the world food problem as one of distribution, and not one that can be solved by genetically engineered food. Rather, they see GMOs as gadget of highly developed countries. In order to stimulate informed public debate on the issue of GM food, the Ministry of Public Health, the Ministry of Agriculture and the Federation of Food Industries have arranged half-day public discussion seminars.

Farmers in Belgium are also concerned about recent developments in the area of biotechnology. They fear that the use of fields for non-food-related biotechnology processes will make them increasingly dependent on large firms for survival, and will lead to agri-business monopolies, to the detriment of independent farmers. They also worry about the effect that transgenetic crops will have on the soil, the environment and biodiversity. Biotechnology firms in Belgium have not yet convinced the population of the benefits of agricultural biotechnology.

From the perspective of the Minister of Health, the following are some of the challenges that Belgium and the entire EU face if a successful agricultural biotechnology industry is to take hold:

- public acceptance of GM food;
- guaranteed safety for consumers and the environment;
- effective control systems;
- consumer information through labelling and education campaigns (in a recent survey, 87% of Belgians felt that the presence of GMOs in food should always be labelled);
- an effective legal framework as well as a reputable and transparent approval process; and
- an entire supply of GMO-free food for those who want it.

The EU continues to debate regulatory and ethical issues surrounding genetically modified plants and food, while national governments and the industry as a whole continue to educate consumers of the benefits of agricultural biotechnology.

Opportunities

There are few agricultural biotechnology companies in Belgium. The true measure of the potential for the industry can be seen in the strength of research institutions and universities throughout the country. In all three regions, research in agricultural biotechnology focusses on genetic engineering and transgenetic improvement of crops. Academic institutions in Belgium are excellent resources for Canadian exporters because of the close relationship that exists among universities, research centres and major biotechnology companies. These institutions can provide useful contacts and technology transfer partnerships, and are often potential customers themselves.

The current movement in Belgium to educate consumers about the benefits of GM food and crops presents opportunities for firms with experience in public relations and public education related to biotechnology and the products of agricultural biotechnology. Public education and acceptance will be significant hurdles to overcome in the development of this market in Belgium.

A recent survey found that most companies are interested in promoting technology transfer within the industry, in creating and strengthening alliances, particularly with universities and government research institutions, and in accelerating the commercialization of research results. The biotechnology industry is growing rapidly, and the government is actively supporting development with R&D funding, and the creation of centres of excellence. Canadian agricultural biotechnology firms will find opportunities to take advantage of favourable government regulations and industry interest in partnerships.

COMPETITIVE ENVIRONMENT

Local Capabilities

Regional governments in Flanders and Wallonia have developed support and incentive programs for biotechnology and other high-technology fields. Both governments support university research programs, both have created biotechnology centres of excellence within the academic community, and both have assisted with partnering opportunities between universities and private industry. For example, VIB is an autonomous biotech research institute, founded in 1995 by the Government of Flanders. VIB combines nine university departments and five associated laboratories. More than 700 researchers (200 senior) and technicians are active within various areas of biotech research. VIB has three major objectives: to perform high-quality research, to validate research results and technology, and to stimulate a well-structured social dialogue on biotechnology.

As a further example of government support for biotechnology development, the government of Flanders has recently given Pharming Group NV, a Dutch company operating in Belgium since 1996, a $4.2-million grant to expand its facilities in Geel, including a plant for the purification of biopharmaceuticals produced in the milk of transgenetic animals.

A number of successful companies have been created as spin-offs of university research. Specifically, the most successful biotechnology company in Belgium, Plant Genetic Systems, was formed as a result of work done at the University of Ghent.

International Competition

Biotechnology, particularly the pharmaceutical industry in Belgium, is dominated by multinational corporations with subsidiary branches or manufacturing plants. Approximately two thirds of Belgium's biotechnology industry is made up of large multinational corporations that also claim the bulk of all biotechnology revenue. Companies with Belgian operations include SmithKline Beecham (SB) Biologicals , Dow Corning, Pfizer, Eli Lilly, and Boehringer Ingelheim Bio Whittaker. SB Biologicals, in particular, represents almost 47% of the total revenue of the biotech sector in Belgium. As Belgian agricultural biotechnology companies continue to flourish, they will likely continue to be interested in partnerships with international companies to share the costs of R&D.

Canadian Position

The Canadian biotechnology industry has flourished over the last several years. With 282 companies involved in the industry and collective revenues of over $1.1 billion, Canada is poised to become a world leader in biotechnology research and production.

Fostering growth in the Canadian biotechnology sector is consistent investment in R&D ($585 million in 1998), financial support by private and public agencies, a solid regulatory framework, strong human resources, and public acceptance of biotechnology-derived products. Canada's positive relations with the world's most prominent economies, as well as its global reputation for scientific excellence, give Canadian companies an advantage in expanding their businesses to overseas markets. Canada is well-positioned to provide joint-venture partnerships, public-education initiatives, and commercialization expertise to the Belgian agricultural biotechnology industry, as well as a broad range of products resulting from Canada's R&D efforts. Canada's strengths in applying biotechnology to agricultural commercialization correspond well with Belgium's needs and interests. The Canadian agricultural biotechnology industry has already received government approval for a number of genetically altered products. The most popular of these include canola, soy beans and corn. Canadian experience in this area will be valuable to the Belgian agricultural biotechnology industry as approval and monitoring processes are put into place.

Competitive Advantage through Canadian Government Policies and Initiatives

Canada-EU Mutual Recognition Agreement

A Mutual Recognition Agreement (MRA) between Canada and the European Union is expected to take full effect on May 1, 2000. This agreement will allow Canadian manufacturers of certain products, including pharmaceuticals, to test their products in Canada and to obtain product acceptance throughout the EU. The MRA will have the effect of ensuring that pharmaceuticals manufactured in Canada conform to EU Good Manufacturing Practices (GMPs) and that those manufactured within the European Union conform to Canadian GMPs. The resulting shortened registration period for new products should ease Canadian exporters' entry into the market.

Canada-EU Cooperation in Science and Technology Agreement

In December 1998, Canada and the European Union signed an amendment to the existing Canada-EU Agreement on Cooperation in Science and Technology. Coverage of the agreement now extends to all sectors, including pharmaceuticals. The original agreement was ratified in February 1996 and was intended to encourage collaborative R&D activities between the two parties. Through the agreement, Canadian and EU researchers are afforded reciprocal access to research programs funded by either the Canadian government or the European Union.

Export Development Corporation (EDC) offers a full range of trade finance services that helps Canadian Exporters and Investors do business in foreign jurisdictions, including higher risk and emerging markets. Founded in 1944 EDC is a Federal Crown Corporation that operates as a commercial finincial institution. Principal services are Account Receivable Insurance, Political Risk Insurance, Bonding for International

Transactions and the Financing of International Transactions.For more information, please call EDC @ 1-888-332-3320

Canadian Commercial Corporation (CCC) also offers small and medium-sized Canadian companies access to financing and better payment terms under the Progress Payment Program (PPP). The PPP concept was developed as a partnership between major Canadian financial institutions and the CCC. It enables the exporter's bank to open a project line of credit for the exporter's benefit, based on CCC approval of the project and the exporter's ability to perform. For more information, please contact the CCC.

Program for Export Market Development
The Program for Export Market Development (PEMD) is the government's primary international business development program. PEMD's objective is to increase export sales of Canadian goods and services by sharing the costs of activities that companies normally could not or would not undertake alone, thereby reducing risks involved in entering a foreign market. The PEMD refundable contribution is a minimum of $5,000 and a maximum of $50,000. Preference is given to companies with annual sales greater than $250,000 and less than $10 million, or with fewer than 100 employees for a firm in the manufacturing sector and 50 in the service industry. Eligible activities, the costs of which are shared on a 50/50 basis, include market visits, trade fairs, incoming buyers, product testing for market certification, legal fees for marketing agreements abroad, transportation costs of offshore company trainees, product demonstration costs, promotional materials, and other costs required to execute the market development plan. Other components of the program deal with international bid preparation under Capital Project Bidding, and with trade associations when developing international marketing activities for their membership. For more information, or to receive an application, please contact the International Trade Centre in your province. Please visit the InfoExport Web site (http://www.infoexport.gc.ca) for addresses. Quebec residents should contact the offices of Canada Economic Development for Quebec Regions, or visit their Web site (http://www.dec-ced.gc.ca).

WIN Exports
Exporters can register with WIN Exports, a database of Canadian exporters and their capabilities. This database is used by trade commissioners around the world and by Team Canada partners in Canada to match Canadian suppliers with foreign business leads and to share information on trade events. For more information, please visit http://www.infoexport.gc.ca/section2/winexp2-e.asp

New Exporters to Overseas Program
Canadian companies that have not yet begun exporting to Belgium can obtain assistance from the Department of Foreign Affairs and International Trade (DFAIT)'s New Exporters to Overseas (NEXOS) program. The program introduces the essentials of exporting, and provides practical information and first-hand exposure to new markets

in Europe. For more information about NEXOS, contact DFAIT's European Trade Fairs and Mission Section (RENF) or visit InfoExport at http://www.infoexport.gc.ca/section2/nexos-e.asp

Technology Partnerships Canada

Industry Canada's Technology Partnerships Canada is an investment loan fund of $250 million that was created to assist the development and eventual export of high-technology products. Investment loans must be fully repaid and are intended to help ensure that products with high potential actually reach the market. Sectors of within bio-industries supported by the program include: therapeutics, including clinical trials in phase I & II; diagnostics, including clinical trials in phase I & II; agri-food; aquaculture; and bio-remediation. For complete information, contact Technology Partnerships Canada at 1-800-266-7531 or consult the Internet at http://tpc.ic.gc.ca.

Science & Technology, and Partnering Division (TBR), Department of Foreign Affairs and International Trade

The Science & Technology, and Partnering Division (TBR) of the Department of Foreign Affairs and International Trade (DFAIT) assists firms in key technology sectors to form international partnerships and alliances. The division is committed to helping small and medium-sized enterprises that have innovative products, services or technologies to expand their commercial interests abroad through partnerships and strategic alliances. Through DFAIT's network of Canadian representatives abroad, TBR offers network access to Canadian firms to promote their partnering interests around the world, provides key contact searches, disseminates market and sector information, and organizes partnering activities facilitating discussions with potential foreign partners.

PRIVATE-SECTOR CUSTOMERS

Belgium has and international reputation for strong research institutions and scientists in the area of biotechnology. Approval of new GM food products have been stalled in Europe, but agricultural biotechnology companies continue to investigate new products and processes. There is a strong interest in technology transfer and collaborative research ventures in Belgium. As is typical in the biotechnology industry, companies often require partnerships in order to help finance product development. Collaborative research work is also a good way to help penetrate a new market.

The following agricultural biotechnology companies represent opportunities for Canadian exporters:

Crop Design NV: newly established agricultural biotechnology company researching higher yields for crops as well as better quality, and disease tolerance, primarily through applications of genes that control cell division in plants. Located in Flanders and a spin-

off from research done at VIB, the company is currently involved with research partners from Australia and other European countries.

Plant Genetic Systems: Originally founded in 1982 and now a wholly owned subsidiary of Hoechst Schering AgrEvo based in Ghent, PGS employs more than 150 people, most of whom work in R&D. The company focusses on enabling technologies for GM plants, including gene promoters, marker genes, and insertion technology to transfer desired genes into plants. Their products are designed for insect tolerance as well as herbicide tolerance.

Innogenetics: a biomedical company founded in 1985 in Ghent. Specializes in the development and marketing of diagnostic products for human diseases. Its target research areas are infectious diseases, tissue repair, and immune, neurodegenerative and genetic disorders. The company has also been successful with strategic partnerships.

PUBLIC-SECTOR CUSTOMERS

Government Organizations

The Belgian government is a strong supporter of biotechnology. The Ministry of Agriculture and the Ministry of Public Heath and Environment are particularly concerned with bio-industries and agricultural biotechnology. Regional governments, too, look to this sector as one for potential long-term growth and high-technology employment. The government supports biotechnology through direct funding, as well as through the creation of research centres of excellence.

Government Procurement Regulations

Belgian government procurement regulations are generally nondiscriminatory, comply with the *World Trade Organization Agreement on Government Procurement*, and follow directives adopted by the EU. In the past, Belgium has been accused of being slow to completely implement EU transparency mechanisms and to retain an unofficial preference toward local suppliers. Through legislation implemented in 1994, the government took steps to remedy the situation. While Canadian companies should be aware of past difficulties, they should not be discouraged from attempting to access the market.

Two laws dealing with government procurement activities in Belgium are intended to make the procurement process transparent and competitive.

- *Law Relative to the Government Procurement Markets and to Certain Construction, Supply and Service Markets* (December 1993); and

- *Royal Decree Relative to Placing into Competition Certain Construction and Supply Markets in the Water, Energy, Transportation and Telecommunications Sectors within the European Union* (July 1994).

Supply and services contract more than $312,000 and any capital projects valued at more than $7.8 million must be publicized throughout the entire EU in the *Journal officiel des communautés Européennes*. All other tenders appear in the Belgian *Bulletin des adjudications*. The length of time between the submission of bids and the awarding of the contract can range from 36 to 52 days. The Belgian government has begun charging fees for the tendering process to help cover administrative costs and to encourage only serious bidders.

The Système d'Information pour les Marchés Public (SIMAP) is a public procurement Web site that provides the information that contractors and suppliers need in order to effectively enter the European procurement process. SIMAP was launched by the European Union to encourage the efficient use of modern information technology for public procurement. Initially, the project aims to improve the quality of information about EU procurement opportunities and to ensure that information is made known to all potentially interested suppliers. In the longer term, the project will address the whole procurement process, including bids, award of contracts, delivery, invoicing and payment. The Web site is located at: http://simap.eu.int

MARKET LOGISTICS

Belgium's central location facilitates access by exporters to the European market. The country is divided into three regions — Flanders, Walloon, and the Brussels-Capital region.

Flanders, with 5.9 million people living in a 13 500-square-kilometre area, is one of the most densely populated areas in the world. The region has a strong industrial infrastructure, including extensive communications and transportation networks and two regional airports. The Flemish government has established a system of industrial areas in which small and medium-sized enterprises specializing in advanced technologies are encouraged to set up operations.

Walloon is an agricultural centre, with an international reputation for its researchers, laboratories and agricultural facilities. The region also has an excellent infrastructure system that includes a major highway network and two airports, as well as canals and rivers.

The Brussels-Capital region, a much smaller region than the other two regions, acts as the administrative centre to the country. Brussels is the world's eighth-largest financial centre, and the location of the federal government. The capital region is also home to

more than 1250 international associations and organizations, including NATO and the European Commission, creating the need for a strong service sector and making Belgium a focal point in Europe. Belgium, which has a prodiminant duality of languages and cultures (with French and Flemish dominating, although a small German community has received official recognition of language and culture) is also known as an effective test market for all of Europe. Still using the Belgian franc as the official currency, Belgium will gradually shift to the euro by January 1, 2002.

Channels of Distribution

Agents and Sales Representatives

Companies selling biotechnology goods and services that do not have an office in Belgium or the EU have the option of retaining a knowledgeable representative to establish contacts and conduct business in Belgium. Belgian law protects distributors against unilateral termination by the principle. Before entering into any agreements, Canadian companies are encouraged to secure the services of an attorney.

Often able to speak French and German, Belgian distributors have a reputation as a neutral source of goods. Most distribution firms are small and specialized, and are subject to the laws of the EU.

Market-entry Considerations

Belgian companies value quality service, rapid delivery and flexibility to customize products to local market conditions. The private sector, government and research organizations in Belgium all place considerable emphasis on networking. Canadian companies interested in participating in the biotechnology industry are advised to become part of this process through participating in trade shows and establishing industry contacts.

Import Regulations

All goods imported into Belgium are subject to a Value Added Tax (VAT) ranging from 6% to 21%. Agricultural biotechnology products and pharmaceuticals are usually assessed at 6%.

Importation of all agricultural biotechnology products is regulated by the federal Ministry of Public Health and Environment, as well as by regional ministries of the environment. The Council for Biosafety and Biotechnology conducts biosafety reviews and advises federal and regional ministers of all concerns related to the use and importation of biotechnology products.

Biotechnology products imported into Belgium from outside the EU must have standard documentation, including an invoice, a bill of lading, a packing list, an import licence where required, a certificate of origin and an insurance certificate. Only those products approved under EU regulations governing GM food products between 1991 and April 1998 are eligible for sale in Belgium.

Biotechnology products may need additional documentation including a health certificate to import live animals or animal products, or a phytosanitary inspection certificate to import certain plants and plant parts, seeds, fresh fruits, etc. All accompanying documentation should be printed in each of Belgium's three official languages: French, Dutch and German. Exporters requiring further information are encouraged to contact the appropriate Belgian ministry, or the importing agency.

Intellectual Property Protection

Belgium is a member of the World Intellectual Property Organization, and a signatory to the Paris Union International Convention for the Protection of Industrial Property (patents, trademarks, trade names, and industrial designs). Exporters can file applications and direct questions to the Service de la Proprieté Industrielle et Commerciale, Ministère des Affaires Economiques (see Key Contacts section for more information).

Patents

When requesting a patent in Belgium, the applicant must choose between an EU or a Belgian patent. For an EU-wide patent, exporters must file an application with the European Patent Office in Munich. The patent will not be valid until a copy of the grant is filed with Office of Industrial Property in the Ministry of Economic Affairs in one of Belgium's three official languages.

European Office of Patents
Office European des Brevets
Erhardtstrasse 27
D80331 Munich, Germany
Tel: (49-89) 23990
Fax: (49-89) 2399-2850

National patents are valid for 20 years (reduced to six years if the applicant does not request a search of the EU patent files). Some biological inventions are specifically excluded from protection. Before beginning the patent application process, exporters should obtain detailed information and hire a patent attorney.

Trademarks

Belgium, along with the Netherlands and Luxembourg, has signed the *Benelux Trade Mark Convention,* which stipulates that a trademark registered in one country is valid in the other two. To ensure protection, companies should register trademarks and complete a search of the trademark files in all three countries. A granted trademark is valid for 10 years from the date of application. While a trademark can be renewed for additional 10-year periods, it will be declared invalid if it is not used within the first three years of registration. Trademarks can be registered with the Benelux Trademark Bureau.

Benelux Trademark Bureau
15 Bardewyklaan
2591 XR Den Haag, Netherlands
Tel: (31-70) 349-1111

Copyrights

Belgium has signed the Bern Convention and the Universal Copyright Convention (UCC). Companies from foreign signatories to the UCC have copyright protection in Belgium. Copyright is valid for the life of the author or creator, plus 70 years.

In May 1998, the EU passed legislation that allows for copyright protection of biotechnological inventions. This measure includes artificial genes, but does not include cloning technology, or the patenting of human embryos. The legislation is expected to be fully implemented by 2001 upon member ratification.

Local Standards, Certificates or Registrations

European Union: The first regulations concerning genetically altered food products were drawn up by the European Union in 1991. As a result, 18 varieties of GM products were approved, including corn and soybeans. In response to public concerns, the European Union stopped approving GM products in April 1998, and announced in June 1999 that no other products would be approved until new evaluation and monitoring standards have been established. At this point, however, all new GM food products have been prevented from entering the EU market.

The European Union's Novel Food Directive of November 1997 requires all GM food to be labelled, whether it is produced in Europe or abroad (as a result of the decisions described above, this applies to GM food products approved between 1991 and April 1998.) The directive also allows companies to label their food as GMO-free if it has not been bioengineered. To date, the EU has granted 18 licences for the sale of GM products. Only GM tomato puree and soya products are marketed in the EU, although soya is an ingredient in almost 60% of all processed foods, and there are no

requirements for GM food derivatives to be labelled as such. As well, most animal feed now contains genetically altered corn, and there are no requirements to label animal food.

Belgium: The Federal Ministry of Public Health and Environment's Food Inspection Unit is directly responsible for implementing the Novel Food Directive, and is a partner in the evaluation of applications for new biotechnology food products. On a national level, the Advisory Committee on Bioethics advises Belgian officials on all areas of biotechnology with potential ethical concerns, and works in conjunction with the Council of Europe and the Expert Group on Ethics of Science and New Technologies of the European Union.

The Biosecurity and Biotechnology section of the Louis Pasteur Scientific Institute for Public Health represents Belgium at all EU meetings related to directive 90/220, evaluates applications and formulates policy recommendations.

The Council for Biosafety and Biotechnology assesses the safety of GMOs as well as human pathogens, considering environmental safety, biodiversity and other uses of biotechnology products. It is composed of representatives from the federal government and regional authorities, including ministries of public health and environment, labour, science policy, and agriculture. The Council must be consulted before any product containing GMOs is placed for sale on the market or released into the environment. The Section of Biosafety and Biotechnology (SBB) is the Council's permanent secretariat, which supervises Belgium's contributions to international information exchange through the EU and the OECD (Organization for Economic Co-operation and Development), as well as information distribution at the federal and regional levels on all scientific and advisory matters related to biosafety. Specific duties include:

- reviewing files for the contained use of biotechnology products, including the release of GMOs to the market or the environment;
- proposing measures for the protection of human health and the environment;
- safeguarding all confidential information related to GMO requests;
- communicating all necessary information to EU members; and
- acting as an international focal point for all Belgian authorities on biotechnology issues.

The SBB also conducts biosafety research on current issues and international perceived problems at the request of the Council for Biosafety and Biotechnology. Until EU regulations concerning the assessment, approval, monitoring and labelling of GM foods are developed, the Belgian Council for Biosafety and Biotechnology will continue to study the issues and educate the public about the role of agricultural biotechnology in future food sources.

PROMOTIONAL EVENTS

Event / Description	Organizer
BIO 2000 March 26-30, 2000 Hynes Convention Centre Boston, MA Note: The largest biotechnology conference and trade show worldwide.	Biotechnology Industry Organization 1625 K Street NW, Suite 1100 Washington, DC 20006 Tel: (202) 857-0244 Fax: (202) 857-0237 Internet: http://www.bio.org/welcome.html
EuropaBio '99 November 16-19, 1999. Munich, Germany Note: The Third Annual European Biotechnology Business Congress "Biotechnology for Economic Growth"	Information: Belgian Biotechnology Tel: (32-2) 646-0564 Fax: (32-2) 640-3759 Contact: Dr. J. Viseur, Secretary General BBA E-mail: secretariat@bba-bio.be
European Biotechnology Symposium September 17-19, 2000 Krasnopolsky Hotel, Amsterdam, Holland Note: 4th annual	Biotech Conferences International Inc. Contact: Harriet I. Matysko E-mail: Hmatysko@Liebertpub.com Contact: Victoria Palusevic Tel: (914) 834-3100 ext. 601 Fax: (914) 834-3689 E-mail: VPalusevic@liebertpub.com

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BIBLIOGRAPHY

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Applied Genetics News. "AgBiotech: Belgian Startup Pursues Plant Genomic," October 1998.

Belgian Biosafety Server. "Biosafety Advisory System: Legal Framework," Available on-line at: **http://biosafety.ihe.be**

Belgian Biotechnology Association. "Biotech in Belgium: Innovation and Growth," October 1998.

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Shimbun, Masao Shimazaki Yomiuri. "Eyeing EU: EU to Modify GM Standards," *World Reporter*, September 1, 1999.

U.S. Department of Commerce. "Belgium: Agricultural Biotechnology," January 1999. Available on line at **http://www.stat-usa.gov**

USEFUL INTERNET SITES

Belgium Bio-industry Association: **http://www.bba-bio.be**

Belgium Biosafety Server: **http://biosafety.ihe.be**
Note: Contains the full text of all EU directives related to biotechnology.

BioResearch Online: **http://www.bioresearchonline.com/**
Note: A wide range of information on the biotechnology and life sciences industries worldwide.

Canadian Business Service Centres: **http://www.cbsc.org**
Note: Western-based companies should see particularly the Agricultural Biotechnology and Biotechnology Loan Program established by Western Economic Diversification Canada.

Canadian Commercial Corporation: **http://www.ccc.ca**

Canadian Exporters Catalogue: **http://www.worldexport.com**

EuropaBio: **http://www.europa-bio.be/corporate/index.html-ssi**

European Congress on Biotechnology: **http://www.ecb9.be/Welcome.html**
Note: Ninth annual congress was held in Belgium July 1999.

ExportSource: **http://exportsource.gc.ca**

Export Development Corporation (EDC): **http://www.edc.ca**

Flanders Region: **http://www.flanders.be**

Food Biotechnology Communications Network (Canadian): **http://www.foodbiotech.org**

Health Canada: **http://www.hwc.gc.ca**

Industry Canada: **http://strategis.ic.gc.ca**

InfoExport: **http://www.infoexport.gc.ca**
Note: This site contains valuable contact information for the Department of Foreign Affairs and International Trade, as well as country studies, research reports and analysis of foreign markets.

Information Systems for Biotechnology: **http://www.nbiap.vt.edu/**
Note: The site houses a regular newsletter. The 1998 edition contains numerous links to biotechnology Web sites worldwide.

Invest in Belgium: **http://mineco.fgov.be/investors/why_invest_in_belgium/index.htm**

Market Access Database: **http://mkaccdb.eu.int**
Note: Users can search by country or industry for trade barriers, tariff regulations and exporter guides. Also contains references to WTO and GATT agreements

Organization for Economic Co-operation and Development: BioTrack Online - Biotechnology at OECD: **http://www.oecd.org/ehs/service.htm**

VIB - Flanders Interuniversity Institute for Biotechnology: **http://www.vib.be/frame.cfm**

Wallonia Region: **http://wallonie.be**

READER EVALUATION

Please help the Market Research Centre to produce market reports which meet your information needs by completing this evaluation form and returning it by fax (613) 943-1103. Thank you for your valuable input.

1. How did you obtain a copy of this market report?
   - ☐ InfoCentre FaxLink system
   - ☐ InfoCentre help line
   - ☐ Local government office
   - ☐ Government Internet site
   - ☐ Other: _____

2. How would you describe this market report?

	Strongly agree	Agree	No opinion	Disagree	Strongly disagree
Useful	☐	☐	☐	☐	☐
Complete	☐	☐	☐	☐	☐
Well organized	☐	☐	☐	☐	☐
Well written	☐	☐	☐	☐	☐
Ideal length	☐	☐	☐	☐	☐

3. In what form do you prefer to obtain these reports?
   - ☐ Print
   - ☐ Electronic

4. Based on the information in this report, what specific action(s) does your organization plan to take in this market? Check all that apply.
   - ☐ Seek an agent/distributor
   - ☐ Visit the market
   - ☐ Do more research
   - ☐ Other: _____
   - ☐ Contact Canadian trade office abroad
   - ☐ Participate in a trade show abroad
   - ☐ Nothing

5. What other market reports would be of benefit to your organization? Please identify specific products and countries. _____

6. Which of the following categories best describes your organization? Check one only.
   - ☐ Processor/manufacturer
   - ☐ Trading house
   - ☐ Export service provider
   - ☐ Industry/trade association
   - ☐ Government
   - ☐ Student/academia
   - ☐ Consultant
   - ☐ Other: _____

7. What were your organization's total sales last year, in Canadian dollars?
   - ☐ Less than $10 million
   - ☐ More than $50 million
   - ☐ $10 million to $50 million
   - ☐ Not applicable

Additional comments/suggestions for improvement: _____

OPTIONAL — The name of your organization is: _____